VOL 17 No 9 SEPTEMBER 1987

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Prepared for the Foreign and Commonwealth Office by
Reference Services, Central Office of Information and
published by Her Majesty's Stationery Office, London
Annual subscriptions including postage and index £23·50

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International Fund for Ireland

The allocation of funds of some £54 million between development programmes and support for specific projects to a total value of £2 million have been announced by the International Fund for Ireland which was set up to promote economic and social advance in Ireland and encourage contact between Northern Ireland and the Irish Republic.

The agreement to establish the Fund was signed in September 1986 (see pp 312-13, 1986) with contributions from the United States, Canada and New Zealand (see p 253, 1986). The United States' initial contribution of $50 million is to be increased to a commitment of $120 million over three years.

Programme Allocations

Seven programmes have received allocations for the next two years as follows: investment companies £9·5 million; business enterprise £7·5 million; tourism £8·9 million; urban development £5·5 million; agriculture and fisheries £3·5 million; science and technology £6·5 million; and 'wider horizons', including exchange schemes, £6·5 million. A reserve of £6 million has been retained as additional finance for the programmes and for projects which do not fit into any of the main categories.

The main area covered by the Fund includes the whole of Northern Ireland and the border counties in the Republic (as defined for European Community purposes) of Cavan, Donegal, Leitrim, Louth, Monaghan and Sligo. Three-quarters of the Fund will be spent in the north.

Investment Companies and Business Enterprise

Two investment companies are in process of incorporation, one in the north and the other in the south, which will seek to stimulate viable and self-sustaining growth in the private sector. The investment companies will deal with larger and medium-sized firms while the business enterprise programme is designed to assist smaller undertakings, develop enterprise in local communities, strengthen management, marketing and design, and promote exports. The business enterprise programme will operate in conjunction with government industrial promotion agencies or local groups.

Tourism

The tourism programme will complement the work of the tourist boards and will concentrate on encouraging private investment in the provision of amenities for tourists on both sides of the border and on marketing specialist holidays.

Urban Development

The existing system of Urban Development Grants, which is intended to promote the regeneration of deprived urban areas, has assisted projects in Belfast and Londonderry. The Fund's urban development programme will have similar aims and will extend to a further 22 towns in Northern Ireland and 12 in the Republic. Particular importance will be attached to environmental considerations in projects designed to develop the economy.

Agriculture and Fisheries

Details are to be announced of a farm diversification programme to operate in both northern and southern counties. Funds have been approved for fitting out a training vessel for the Fisheries Training Centre in County Donegal and a proposal for the construction or purchase of an Irish Sea fisheries research ship is being pursued.

Science and Technology

Further commercially beneficial links will be promoted between commerce and industry and the universities, research institutions and technical colleges. Particular attention will be given to research and development programmes promising direct commercial benefits.

Wider Horizons

The 'wider horizons' programme is designed to broaden the experience of applicants and will include schemes for overseas training, exchange and work experience, youth exchange and proposals for interchange within the European Community. There will also be schemes to encourage an awareness of export possibilities.

Projects Approved

A variety of projects have been approved for funding so far, the largest being Eurocentre West, an industrial complex in Londonderry (£480,000). Others include Queen's University, Belfast, for technical services to industry (£100,000); a development chair in information technology at Magee College in the University of Ulster (£250,000); the fisheries training vessel in County Donegal (£IR 100,000); and, under the wider horizons scheme, a work experience scheme for construction craftsmen in Paris, work experience and training for hotel and catering workers in the United States and Canada, graduate sponsorship, artists' exchanges, and overseas marketing training (with a total commitment of £850,000). In addition three new Kilkenny Design Awards (awarded in the Irish Republic to promote good design) are to be sponsored in 1988 for students resident in or studying at institutions in the area covered by the Fund.

Shorter Note

CHANGES IN CIVIL SERVICE MANAGEMENT

Following a review of the distribution of functions between the Management and Personnel Office (part of the Cabinet Office) and the Treasury, changes are to be made to the management of the Civil Service.

Those functions of the present Management and Personnel Office which bear directly on financial management and on manpower, pay and financial conditions of service, will be transferred to the Treasury. Under the Head of the Home Civil Service, the Cabinet Office will be responsible for advising the Prime Minister as Minister for the Civil Service on duties and standards in the Civil Service and on the selection and development of civil servants. For this purpose the Management and Personnel Office will be reconstituted as the Office of the Minister for the Civil Service, which will continue as a sub-department of the Cabinet Office. Mr Richard Luce, Minister of State, Privy Council Office, will be in day-to-day charge of the new Office, as he has been of the Management and Personnel Office. He will also continue to answer parliamentary questions on matters dealt with by the new Office. It is hoped that the transfer of functions will take place this autumn.

[The Management and Personnel Office was established in 1981 when the Civil Service Department was abolished – see pp 356-7, 1981.]

Source: Prime Minister's Office press notice, 7.8.87.

ECONOMIC AND SCIENTIFIC AFFAIRS

National Accounts 1986

The British economy grew by about 3 per cent in 1986 – similar to the average rate for each year since the 1981 trough. Services made the chief contribution to growth. While profits of North Sea oil companies fell sharply, those of other industrial and commercial companies rose. National wealth increased by 12 per cent but fixed investment was broadly constant.

The National Accounts 'Blue Book',[1] published on 4 September, gives revised figures for national income, expenditure and output for each of the 11 years from 1976 to 1986, with summary tables going back to 1965. It includes a new section on the size, structure and distribution of national wealth.

Gross Domestic Product

Gross domestic product (GDP) at factor cost,[2] after allowing for inflation, increased by around 3 per cent between 1985 and 1986 (see Table 1) to a level 11 per cent above the previous peak, reached in 1979. Since the trough of 1981 the annual rate of growth has averaged a little under 3 per cent.

The average measure of GDP at current market prices (the prices that consumers pay for goods and services) – money GDP – rose by 7 per cent.

In 1986 the increase in GDP at factor cost attributable to inflation was 2·7 per cent and the corresponding figure for GDP at market prices was 3·6 per cent; both were significantly lower than in 1985.

The expenditure measures of GDP and gross national product (GNP – equal to GDP plus net property income from abroad) in 1986 are analysed according to category of expenditure and by market prices and factor cost in Table 2.

Output by Industry

Manufacturing output increased by a little under 1 per cent in 1986 (see Table 3). Within manufacturing, there was sustained growth in some sectors such as paper, printing and publishing (up by 4 per cent) and 'all other manufacturing', which includes timber, furniture, rubber and plastics (up by 6 per cent). Declining sectors included man-made fibres (down by 8 per cent) and motor vehicles and parts (down by 5 per cent). Output of energy and water supply grew by over 4 per cent; this performance was largely a reflection of increased output by the utilities and the continued recovery of coal output after the 1984-85 dispute (see pp 77-8, 1985). Output of agriculture, forestry and fishing remained constant but that of construction rose by over 2 per cent. Services made the major contribution to growth in 1986, with a rise in output of 4 per cent. Distribution, hotels and catering, and repairs grew by 5 per cent, communication by 6 per cent and financial and business services and leasing by 10 per cent.

Personal Income, Expenditure and Saving

Total personal income increased by 8 per cent in 1986 (see Table 4) as did income from employment. Income from self-employment rose by 13 per cent. Prices as measured by the consumers' expenditure deflator increased by 3·6 per cent and real personal disposable income by over 4 per cent.

With consumers' expenditure at current prices growing by more than personal disposable income, the saving ratio (saving as a percentage of personal disposable income) declined from 10·4 per cent in 1985 to 9·1 per cent in 1986 – its lowest since 1971.

Consumers' expenditure in volume terms rose by almost 6 per cent in 1986 with spending on durable goods increasing by 10 per cent. There was increased expenditure on all other goods and services except tobacco. The rise for clothing and footwear was over 7 per cent and for energy products 4 per cent.

Companies

Gross trading profits (net of stock appreciation) of North Sea oil companies in 1986 were less than half their 1985 level, largely as a result of the fall in the oil price (see p 193, 1986). Those of other industrial and commercial companies rose by 22 per cent. In 1986 industrial and commercial companies had a financial surplus (broadly, undistributed income minus fixed investment and increases in stock values) of £6,400 million compared with one of £7,300 million in 1985.

Wealth

At the end of 1986 net national wealth (consisting of tangible assets and overseas assets less liabilities) amounted to £1·8 million million, 12 per cent more than a year earlier. Of the 1986 total, residential buildings comprised almost £700,000 million, other land, buildings and works around £500,000 million and plant and machinery £260,000 million.

The personal sector accounted for 75 per cent, companies for 13 per cent, public corporations for 5 per cent and general government for 7 per cent.

Fixed Investment and Stockbuilding

Gross domestic fixed capital formation (fixed invest-

[1] *United Kingdom National Accounts 1987 Edition.* Central Statistical Office. HMSO, £11·95. ISBN 0 11 620297 1.

[2] The total net value received by producers for goods and services produced, after deducting indirect taxes and adding subsidies. (GDP is here a simple average of the three estimates based on income, expenditure and output data.)

ment) increased by only 0·3 per cent in volume terms in 1986 but was still 24 per cent above the low point of 1981 and 6 per cent above the 1979 peak. Investment in vehicles, ships and aircraft and in plant and machinery fell but there were offsetting increases in investment in dwellings and in other new buildings

Table 1

Average Measures of Gross Domestic Product

	1976	1981	1985	1986
at constant factor cost (1980=100)	94·5	99·0	110·4	113·8
at constant market prices (1980=100)	94·1	98·8	110·3	113·9
at current factor cost (£000 million)	111·9	217·7	304·8	322·9
at current market prices (£000 million)	124·8	254·1	354·3	378·7

Table 2

Analyses of Gross Domestic Product and Gross National Product (Expenditure Measures) in 1986

£ million

At market prices	
Consumers' expenditure	234,167
Central government final consumption	48,724
Local authorities' final consumption	30,699
Gross domestic fixed capital formation	64,227
Value of physical increase in stocks and work in progress	551
Total domestic expenditure	378,368
Exports of goods and services	97,835
Total final expenditure	476,203
Less imports of goods and services*	−101,308
GDP at market prices†	374,895
Net property income from abroad	4,686
GNP at market prices†	379,581
At factor cost	
Adjustment of GDP at market prices to factor cost‡	55,806
GDP at factor cost	319,089
GNP at factor cost	323,775

*Excluding taxes on expenditure levied on imports.
†Including taxes on expenditure levied on imports.
‡Taxes on expenditure less subsidies.

Table 3

Index Numbers of Output (at Constant Factor Cost)

1980=100

	1985	1986
Agriculture, forestry and fishing	118·8	118·8
Energy and water supply	120·1	125·4
Manufacturing	103·8	104·7
Construction	99.8	102·1
Distribution, hotels and catering; repairs	114·8	120·4
Transport and communication	112·1	116·7
Other services	112·9	116·9
GDP (output measure)	110·7	114·0

and works. Investment by the private sector and public corporations declined while that by general government rose.

By industry, there was an increase of 7 per cent for communication but falls of 15 per cent by mineral oil and natural gas extraction and 6 per cent by financial and business services and leasing (largely because of a reduction in the acquisition of assets for financial leasing).

Measured in 1980 prices, the level of stocks and work in progress rose by £660 million in 1986, slightly above the increase in 1985. Manufacturing recorded a fall as did mineral oil and natural gas extraction but there were increases in almost all other industries.

Table 4

Personal Income and Expenditure *£ million*

	1985	1986
Income from employment	194,434	209,445
Income from self-employment*	30,481	34,340
Rent, dividends and net interest	28,149	30,058
Current grants from general government (including social security benefits)	46,651	50,543
Other†	2,132	2,324
Total personal income*	301,847	326,710
Deductions from income:		
British taxes on income	37,520	41,227
Social security contributions	24,200	26,067
Current transfers	1,709	1,904
Personal disposable income	238,418	257,512
of which:		
Consumers' expenditure	213,720	234,167
Saving	24,698	23,345

*Before providing for depreciation and stock appreciation.
†Other current transfers and the imputed charge for capital consumption of private non-profit-making bodies.

Balance of Payments 1986

With the collapse in the oil price leading to a halving of the surplus on oil, the current account of Britain's balance of payments was in deficit – by £1,000 million – in 1986 for the first time since 1979. There was a sharp increase in the surplus on invisible transactions, to £7,500 million, but this was insufficient to offset a deficit on visible trade of £8,500 million.

Revised figures for the balance of payments for the last 11 years are contained in the latest Balance of Payments 'Pink Book', which was published on 21 August.[1] Transactions are classified into two main groups: current account transactions, covering exports and imports of goods and services, investment income and most transfers; and transactions in British external assets and liabilities, covering inward and outward investment, transactions by banks in Britain, borrowing and lending overseas by other British residents, drawings on and additions to the official reserves, and other capital transactions. This article briefly describes the major changes in the balance of payments in 1986.

Current Account

The deficit on the current account in 1986 was £980 million; in 1985 there had been a surplus of £2,919 million (see Table 1). The deficit on visible trade of £8,463 million more than offset the surplus on invisible trade of £7,483 million. Between 1985 and 1986 visible exports fell in value by 7 per cent while visible imports rose in value by 1 per cent (see Table 2).

Visible Trade

The decline in the value of exports was more than accounted for by the fall in oil exports; in 1986 these were just over half their level of a year earlier (see Table 3). Oil imports also declined by about a half. However, the fall in both was entirely the result of the collapse in the oil price (see p 193, 1986); export and import volumes rose. Although the oil surplus fell by a half, from £8,104 million to £4,056 million, exports in 1986 were nearly twice as high as imports – as they had been in 1985. Oil accounted for 5 per cent of total exports in 1976, 21 per cent in 1985 and 11 per cent in 1986; the proportions of total imports were 18 per cent, 10 per cent and 5 per cent respectively. Between 1976 and 1986 manufactures (semi-manufactures and finished manufactures) fell from 82 per cent of total exports to 75 per cent; as a proportion of total imports they rose from 54 per cent to 74 per cent. There are now substantial deficits on trade in food, beverages and tobacco, in basic materials and in manufactures.

Britain usually has a deficit on trade with the rest of the European Community and with other Western European countries; in recent years it has had a surplus on trade with North America and with the oil-exporting countries (see Table 4). The Community accounts for just under half of Britain's exports and for a little

[1] *United Kingdom Balance of Payments 1987 Edition.* Central Statistical Office. HMSO, £8·95. ISBN 0 11 620296 3.

Table 1

Summary of Balance of Payments

£ million

	1976	1981	1984	1985	1986
Visible trade balance	−3,929	3,360	−4,384	−2,178	−8,463
Invisible trade balance	3,009	2,952	5,858	5,097	7,483
of which *Services*	2,245	3,693	3,481	5,381	4,990
Interest, profits and dividends	1,550	945	4,216	2,992	4,686
Transfers	−786	−1,686	−1,839	−3,276	−2,193
Current balance	−920	6,312	1,474	2,919	−980
Transactions in assets and liabilities					
British external assets	−3,699	−49,475	−31,039	−51,301	−92,229
British external liabilities	4,317	43,071	24,123	43,880	81,482
Allocation of SDRs	—	158	—	—	—
Balancing item*	302	−66	5,442	4,502	11,727

*Reflects distortions and omissions, and is included to make total entries sum to zero.

Table 2

Current Account

£ million

	1976	1981	1984	1985	1986
Exports (free on board)	25,191	50,977	70,367	78,111	72,843
Imports (free on board)	29,120	47,617	74,751	80,289	81,306
Visible trade balance	**−3,929**	**3,360**	**−4,384**	**−2,178**	**−8,463**
Invisible trade balance	**3,009**	**2,952**	**5,858**	**5,097**	**7,483**
Services					
General government	−652	−865	−1,185	−1,300	−1,399
Private sector and public corporations					
Sea transport	78	−160	−1,132	−1,166	−937
Civil aviation	209	347	102	40	−449
Travel	700	−302	−50	571	−646
Financial services	1,259	2,063	3,144	3,987	4,875
Other services	651	2,610	2,602	3,249	3,546
Interest, profits and dividends					
General government	−225	30	−506	−737	−908
Private sector and public corporations	1,775	915	4,722	3,729	5,594
Transfers					
General government	−776	−1,606	−2,100	−3,336	−2,235
Private sector	−10	−80	261	60	42
Current balance	**−920**	**6,312**	**1,474**	**2,919**	**−980**

over half of Britain's imports. In 1986 the other Western European countries took 10 per cent of Britain's exports, North America 17 per cent and the oil-exporting countries 8 per cent. Their shares of Britain's imports were 14 per cent, 12 per cent and 2 per cent respectively. The North American share had been 14 per cent in 1985.

Invisible Trade

Credits on invisible trade in 1986 amounted to £76,202 million and debits to £68,719 million, giving a surplus of £7,483 million (see Table 2). The surplus in 1985 had been £5,097 million. There was a surplus of £4,990 million on services (compared with one of £5,381 million in the previous year), a surplus of £4,686 million on interest, profits and dividends (£2,992 million in 1985) and a deficit of £2,193 million on transfers (£3,276 million in 1985).

The services account consisted of the usual deficit of general government (£1,399 million, a little higher than a year earlier) and surplus of the private sector and public corporations (£6,389 million compared with £6,681 million in 1985). The deficit on sea transport fell from £1,166 million to £937 million as a result of a rise in the surplus on shipping operations by British residents, those by overseas residents remaining in substantial deficit. The civil aviation account was in deficit for the first time in a number of years mainly as a result of a sharp rise in payments by British passengers to overseas airlines. With an increase of almost 30 per cent in outgoings for leisure travel, the travel account moved from a surplus of £571 million in 1985 to a deficit of £646 million in 1986. The surplus on financial services (for which only credits are recorded) was £4,875 million compared with just under £4,000 million a year earlier; the main cause of the rise was an increase of almost £700 million in the

Table 3

Overseas Trade by Commodity

Balance of payments basis

£ million

	1976	1981	1984	1985	1986
Exports					
Food, beverages and tobacco	1,654	3,611	4,672	4,932	5,439
Basic materials	807	1,316	2,014	2,144	2,058
Oil	1,172	9,107	14,852	16,134	8,221
Other mineral fuels and lubricants	93	507	456	661	462
Semi-manufactured goods	7,996	13,160	18,266	20,051	20,946
Finished manufactured goods	12,654	21,757	28,324	32,221	33,540
Others	815	1,518	1,784	1,968	2,176
Total	**25,191**	**50,977**	**70,367**	**78,111**	**72,843**
Imports					
Food, beverages and tobacco	4,617	5,967	8,196	8,522	9,230
Basic materials	3,022	3,340	4,864	4,795	4,416
Oil	5,119	5,996	7,915	8,029	4,165
Other mineral fuels and lubricants	122	879	2,002	2,204	1,829
Semi-manufactured goods	7,014	11,660	18,410	19,949	21,524
Finished manufactured goods	8,719	18,674	32,059	35,324	38,453
Others	507	1,101	1,305	1,465	1,689
Total	**29,120**	**47,617**	**74,751**	**80,289**	**81,306**
Balances					
Food, beverages and tobacco	−2,963	−2,356	−3,524	−3,591	−3,792
Basic materials	−2,215	−2,024	−2,850	−2,651	−2,359
Oil	−3,947	3,112	6,937	8,104	4,056
Other mineral fuels and lubricants	−29	−372	−1,546	−1,542	−1,366
Semi-manufactured goods	982	1,500	−144	102	−578
Finished manufactured goods	3,935	3,083	−3,735	−3,103	−4,914
Others	308	417	479	503	487
Visible trade balance	**−3,929**	**3,360**	**−4,384**	**−2,178**	**−8,463**

earnings of insurance underwriters. At £3,546 million, the surplus on other services (including, for example, earnings from consultancy and royalties) was about £300 million higher than a year earlier.

On interest, profits and dividends, the customary surplus of the private sector easily outweighed the deficit incurred by general government and public corporations to give an overall surplus of £4,686 million. This was substantially above the 1985 surplus of just under £3,000 million. The chief reasons for the improvement were an increase in earnings on British portfolio investment overseas and a fall of £1,852 million in outgoings to overseas holders (particularly oil companies) of direct investments in Britain.

The deficit on transfers fell from £3,276 million to £2,193 million between 1985 and 1986. The improved outturn was mainly the result of a rise in government receipts from European Community institutions and a fall of nearly £1,000 million in government payments to the same bodies. Exceptional transactions under the Community budget meant that payments under both the 1984 and 1985 intergovernmental agreements were made in 1985 while there was a delay until early 1986 in the receipt of most of the value added tax abatement arising out of Britain's excess contribution to the 1984 Community budget (see p 96, 1985).

Transactions in External Assets and Liabilities

Inward and outward investment rose substantially between 1985 and 1986 (see Table 5). The increase in inward portfolio investment was more than accounted for by the rise in acquisition of ordinary shares while the growth in outward portfolio investment was the result of a huge increase in holdings of securities by British financial institutions other than banks. Transactions of British banks (other than direct and portfolio investment) resulted in a net inflow of £10,151 million compared with one of £7,413 million in 1985. Additions to the official reserves were £2,891 million in 1986 compared with £1,758 million a year earlier. At the end of 1986 Britain had direct investment holdings overseas of £90,800 million and portfolio investment holdings of £145,700 million compared with £74,800 million and £100,700 million respectively a year earlier. Overseas residents' holdings in Britain of direct investments amounted to £48,600 million and of portfolio investments to £42,900 million compared with £43,300 million and £32,400 million respectively a year earlier.

Table 4

Overseas Trade by Area

Balance of payments basis *£ million*

	1976	1981	1984	1985	1986
Exports					
European Community	9,520	21,978	32,999	37,964	34,792
Other Western Europe	3,278	5,267	7,095	7,574	7,197
North America	3,065	7,139	11,479	13,312	12,171
Other developed countries	1,932	2,925	3,713	3,803	3,656
Oil-exporting countries	3,172	6,005	5,802	5,945	5,501
Rest of the world	4,224	7,662	9,279	9,513	9,526
Total	**25,191**	**50,977**	**70,367**	**78,111**	**72,843**
Imports					
European Community	11,706	21,895	36,083	40,000	43,174
Other Western Europe	3,633	6,334	10,720	11,501	11,366
North America	3,887	6,851	10,328	10,871	9,368
Other developed countries	2,040	3,084	5,105	5,883	6,319
Oil-exporting countries	3,854	3,455	2,657	2,604	1,619
Rest of the world	3,999	5,998	9,858	9,430	9,459
Total	**29,120**	**47,617**	**74,751**	**80,289**	**81,306**
Balances					
European Community	−2,186	83	−3,084	−2,036	−8,382
Other Western Europe	−355	−1,067	−3,625	−3,927	−4,169
North America	−822	288	1,150	2,440	2,803
Other developed countries	−108	−159	−1,392	−2,080	−2,664
Oil-exporting countries	−682	2,550	3,144	3,341	3,882
Rest of the world	225	1,664	−577	84	67
Visible trade balances	**−3,929**	**3,360**	**−4,384**	**−2,178**	**−8,463**

Table 5

Summary of Transactions in External Assets and Liabilities *£ million*

	1976	1981	1984	1985	1986
Overseas direct investment in Britain	1,653	2,932	−181	4,421	5,420
Overseas portfolio investment in Britain	1,032	323	1,419	7,079	8,202
British direct investment overseas	−2,419	−6,005	−6,086	−8,821	−11,386
British portfolio investment overseas	95	−4,300	−9,550	−17,830	−22,870
Borrowing from overseas	1,418	40,022	22,925	32,360	67,693
Deposits and lending overseas	−1,561	−41,682	−15,567	−22,162	−54,548
Official reserves*	853	2,419	908	−1,758	−2,891
Other external liabilities of general government	214	−206	−40	20	167
Other external assets of central government	−667	93	−743	−730	−535
Total	**618**	**−6,404**	**−6,916**	**−7,421**	**−10,747**

*Drawings on (+)/additions to (−).

Note: Differences between totals and the sums of their component parts are due to rounding.

British Construction Overseas

British construction companies won new overseas contracts worth £1,500 million in 1986, about the same as in the previous year. The Middle East remains the largest market, despite a decline in new work in the region; there was growth for British firms in the North American market.

This article, describing overseas building and civil engineering in 1986 and giving details of a number of major contracts, is based on an article contributed by the Department of the Environment to *British Business* for 31 July.

Value of Overseas Work 1986

British building and civil engineering contractors won new overseas orders worth an estimated £1,471 million in the calendar year 1986, much the same as

Construction Work Overseas

£ million (current prices)

Area	Value of contracts obtained		Value of work done		Value of work outstanding	
	1985-86	1986*	1985-86	1986*	1985-86	1986*
European Community	108	93	79	83	84	98
Rest of Europe	28	57	23	20	15	49
Middle East in Asia	222	187	585	425	380	269
Middle East in Africa	249	149	81	116	413	501
Rest of Asia	197	192	261	282	298	374
Rest of Africa	203	197	381	309	345	283
The Americas	301	406	594	403	808	578
Oceania	183	190	199	237	144	147
All countries	1,491	1,471	2,203	1,885	2,487	2,299

*The 1986 figures are provisional. They also refer to the calendar year, as will future figures in this series. Earlier figures are based on financial years.

in the financial year 1985-86 (see footnote to the table). Although there was a significant decline in the Middle East market, this was largely offset by gains in North America, a market in which there has been a sharp recovery since 1984-85.

Overall, there has been a further decline in work done between 1985-86 and 1986. However, there was increased activity in both Asia and Oceania.

At the end of 1986, British construction companies had overseas work outstanding to the value of £2,300 million. This is concentrated mainly in the United States, Egypt, Australia, Oman, Sri Lanka and Spain, but British companies are also active in most of Africa and the Middle East and have won further work in the People's Republic of China.

Generally speaking, the figures reflect a worldwide downturn in the competitive international construction market.

The top ten companies continued to account for the major share of overseas construction activity by British firms, with 85 per cent of the value of work done in 1986. This compares with 90 per cent for 1985-86. Among firms winning Queens Awards for Export (see p 164) were Ayala Abbott and Butters of Needham Market, Suffolk (who design, make and fit high-quality interiors for public buildings), Stannah Lifts of Andover, Hampshire (making domestic stairlifts), and Mabey and Johnson of Reading, Berkshire, who produce Bailey and Mabey panel bridges.

A number of representative examples of construction projects are described in the following paragraphs. They are reported more fully in *British Business*.

Africa

The Cairo Wastewater Project continues to be the largest construction project in Africa, and British firms are continuing to play an important part in it (see p 393, 1986). The project is to replace the existing 70-year-old system with a new sophisticated one capable of meeting the needs of Cairo's fast-expanding population.

Higgs and Hill has been awarded a £25 million management contract by the Cairo Organisation for Medical Treatment for the design, construction and equipping of the 300-bed Pyramid Hospital. Costain International, in joint venture with a local firm, has been appointed main contractor for the first phase of the project. The hospital will be a nine-storey stepped structure, arranged around a central courtyard and have the facility to be extended in two further phases.

Costain Projects is engaged on a £20 million contract for the Egyptian national pipeline company, Petroleum Pipelines Company. The contract is believed to be the first large oil-related project awarded to a British company by the Egyptian oil industry.

Cementation International, part of the Trafalgar House Group, is involved in a joint venture with Consolidated Contractors, to build the civil portion of a military city development at El-Haminan, near Alexandria.

Tarmac Overseas is active in Algeria on the Mascara Hospitals project. The £40 million project provides for four 240-bed hospitals built on the Clasp modular construction system. The contract provides for the design and provision of all mechanical and electrical services including medical equipment. The sites are located within the earthquake zones and therefore structures are designed to seismic loading.

Work continues on a £12 million road improvement scheme in Ghana by Taysec, part of Taylor Woodrow International, for the Ghana highway authority. The contract provides for improvement work on a 47-km (30-mile) stretch of the road between Yapei and Morne, in the north of the country; the work is due to be completed by March 1988.

Biwater Treatment and a local partner have been awarded a £7 million water supply contract in Cameroon. It is the first stage of a four towns scheme, involving the rehabilitation and modernisation of water supply facilities in the north and west of the country.

Kier International has won a £0·8 million contract to reconstruct the National Development Bank for the Government of Botswana. The company has also won a contract for the School of Health Sciences in Malawi which involves remedial work at a hospital development.

Wade Adams Construction has been awarded two contracts with a combined value of £2·5 million, for work in Tanzania. The largest job, at £1.3 million, is for harbour improvements at Kilwa, Masoko and Lindi on the country's south coast. The second involves construction of five warehouses at Mwanza, Morogoro, Arusha, Kigoma and Mbeya.

Asia

In a £70 million joint venture with a local firm in Oman, Balfour Beatty is constructing a 78-km (50-mile) road in the remote Dhofar region. The builders have to contend here with a hilly terrain, high-humidity mists for two to three months a year, and summer temperatures which restrict concrete pouring to the night shift. The road is due to be completed in June 1988.

In association with Bulvar Whitleymoran and two Dutch firms, Balfour Beatty has won a £16 million contract to repair and refurbish the Al Shindagha tunnel under Dubai Creek. It will comprise two carriageways and a tunnel with pedestrian subways and a service tunnel.

Wimpey subsidiary Al Wimpey Roads and Construction (Abu Dhabi) has won a £3·6 million contract to resurface the runways and taxiways at Abu Dhabi airport. The contract, for the Emirate's public works department, involves the removal of the asphalt upper wearing course and resurfacing with asphalt concrete, while keeping the airport operational throughout.

British reinforced concrete contractor Tileman has won two contracts in Saudi Arabia for the construction of a £2·8 million 120-m (395-foot) chimney at a power station near Abha in the south-west of the country, and the second to build a windshield at another power station at Quraygah. Tileman has a third contract, this time in Jordan, to build a 68-m (220-foot) high tower to provide panoramic views of Amman and the surrounding countryside.

Ayala Abbott and Butters has recently completed on time a large contract for special interiors for the New Palace of Congress in Kuwait.

For Balfour Beatty 1986 saw the start of a joint venture with a Japanese company – the £288 million Samanalawewa hydro-electric project for the Ceylon Electricity Board in Sri Lanka. The company had already carried out the critical feasibility study and has now been awarded an £83 million contract, as project leader. The contract also calls for the civil engineering work associated with the construction of a 5-km (3·1-mile) tunnel through rock, construction of surge chambers and the erection of a construction village. The village will eventually be used by families who lose their homes when the dam is flooded.

The People's Republic of China remains a market with huge potential, but so far limited opportunities. However, following the acquisition of Gerry Long Associates, Bovis will be involved in an £18 million 380-room hotel project in the Chinese capital, Beijing – the Beijing Asia Hotel. In a joint venture, Gateway Developments and two other overseas companies have won a £29·3 million contract to build a trade centre in Tianjin in northern China. The centre will consist of apartments, conference facilities and sports halls.

Biwater was awarded a £425 million government contract in Malaysia to implement a giant rural water supply programme to provide 2·1 million people with clean drinking water by the year 1990. The contract, which will be carried out as a joint venture with a local partner, involves the construction of 174 schemes spread throughout 13 states in Malaysia.

Costain International has won a contract worth £10·3 million from the Hong Kong water supplies department for the construction of the Pak Kong water treatment and transfer scheme. The contract, due for completion in August 1988, involves the construction of a water inlet, clarifier tanks, treated water reservoir and a clean water pumping station.

Kier International has a roadworks contract from the Hong Kong Government. Worth £18·5 million, it involves the building of overpasses, underpasses and pedestrian ways in the central district of Hong Kong.

Cementation International has won two contracts in Hong Kong recently: a £13 million contract as main contractors on the Harbour Islands pumping station, and a contract for superstructural work on the £53 million Taikou Shing project for Swire Properties.

North America

Thomas Storey (Engineers) were very quick to respond to the collapse of a major bridge in the United States by designing a temporary replacement bridge and flying it to the site within four days. Mabey and Johnson have also won contracts for panel bridges in the same market, where prompt delivery was a vital factor.

Taylor Woodrow Construction Corporation has won a number of contracts in the United States. Hillsborough County Aviation Authority are clients for a £14 million project to construct a new international terminal at Tampa Airport, Florida. The new terminal is 260 m (850 feet) long and on two levels. There will be 15 aircraft gates and a 400-m (1,300-feet) long automated passenger transit conveyor belt linking the new terminal with the existing one. The automated system will be constructed on piled foundations and comprise 12 columns and caps, with steelwork in between, forming the support for the automated passenger conveyor belt and concrete emergency exits. The structure will be clad with aluminium and glass curtain walling.

Europe

The European market is Britain's closest yet, paradoxically, it remains one of the construction industry's smallest. However, in the recent years the amount of work found there has grown rapidly in percentage terms, particularly in the European Community, but this is from a very low base and in volume terms still remains modest. Wiltshiers, however, has won a number of contracts in France, using its own name and its own workforce. Work so far has mainly comprised refurbishments, but the company recently won a £0·3 million contract to install an engine testing laboratory for the Italian car and truck firm, Fiat, at Bourbon-Lancy. The project involved the construction of a series of concrete cells with four-hour fire protection, equipped with electrically operated doors and an overhead conveyor system. The project was designed to conform to Swiss safety legislation as well as to French building standards.

GKN Keller is to install 20,000 columns of stone into what was once a rubbish tip after being awarded a £3·7 million vibro-compaction contract by Köln (Cologne) Traffic Department. The work, on an eight-hectare (20-acre) train yard, will increase the shear strength and load-bearing capacity of the site.

Portugal remained an important source of work for British contractors last year. Bovis International continued work on three schemes at Quinta do Lago: a large villa development of its own, and, as management contractors, a £12 million hotel complex and an 18-hole golf course and apartment project.

Balfour Beatty, in joint venture with a local firm in Turkey, has been awarded a £45 million contract by the Ministry of Works to construct a 37·5-km (23-mile) section of the Trans-Turkey highway which will eventually link with the second Bosphorus Bridge, which is due to be opened in the summer of 1988.

Also in Turkey, John Laing has been awarded a £13·9 million contract for the construction of four grain silos, with a total capacity of 130,000 tonnes, at various ports in the country. The three-year project, which was financed by the World Bank, included internal refurbishment of silos at two additional sites.

Shand has been awarded a £1 million contract to develop a site opposite Gibraltar airport. The development will consist of a supermarket, shops and a travel bureau.

Marples International has been awarded a £2·5 million contract to design and build a NAAFI store in Gibraltar.

Taylor Woodrow announced a breakthrough into the Soviet market in 1987, with contracts totalling nearly £20 million. Orders for works to three clothing factories are due to be completed by October next year.

Australasia

Costain Australia has been appointed management contractor for the £60 million redevelopment of the Frankston City Council civic centre near Melbourne, and Costain subsidiaries are also expected to win much of the construction work.

In a joint venture with Wilkins and Davies Construction of New Zealand, Taylor Woodrow International has recently been awarded the contract for the third phase of a multi-million pound project to build Mid City Towers in the centre of Auckland. This 24-storey development will comprise a five-storey podium topped by a 19-storey tower and is due for completion early in 1988. The joint venture is already developing phases one and two of the project.

Shorter Notes

FINANCING INDUSTRIAL INNOVATION

In a report entitled *Focus on Innovation*, published in July, the Technology Requirements Board notes that expenditure by British firms on research and development is increasing, but not as fast as that of some of Britain's competitors in the industrialised world. Companies needed, therefore, to spend more in this area. Equally, there was a need for increased support from the Department of Trade and Industry (DTI) whose funding should concentrate on the development and application of four key technologies: information technology, advanced manufacturing technology, biotechnology, and materials technology. The report commends the Government's new LINK programme (see pp 29-30), Britain's participation in the European EUREKA programme (see p 213, 1986) and the new exploitable areas of science process (see p 277), and welcomes moves to study the question of investment in research and development by the financial sector.

The report recommends a campaign in 1987 to persuade industry in Britain to take advantage of lower rates of inflation and expanding sales by spending 5-10 per cent more each year (in real terms) on research and development.

A sharp increase in the DTI's support would highlight civil research and development as a government priority, as well as directly encouraging firms to innovate.

The Board also suggests studies to improve the management of innovation in order to speed up the rate of exploitation of scientific and technological advances. It also calls for the disclosure of research and development spending in the accounts of British companies as a means of focusing the attentions of both investors and firms on this aspect of their activities.

[The Technology Requirements Board was established in November 1985 to advise the DTI on innovation policy and consists of representatives of industry, banking and the scientific community, with the participation of DTI officials.]

Source: *Focus on Innovation, A report by the Technology Requirements Board*, available unpriced from the TRB, Room 305, Ashdown House, 123 Victoria Street, London SW1E 6RB.

ADVANCED MANUFACTURING IN ELECTRONICS

On 18 August Mr John Butcher, a Parliamentary Under-Secretary of State for Industry, named the 12 educational institutions in various regions which have been chosen to host awareness and training centres for Advanced Manufacturing in Electronics (AMIE). In view of the demand for these centres the Department of Trade and Industry has decided to double both their number (from the six originally planned) and their funding (from £1 million to £2 million). Up to £150,000 will be offered to each centre, covering about half its initial costs. After two years the centres will be encouraged to become self-supporting. They will provide training courses and advice on AMIE technology and will keep in close touch with local firms.

The centres will be located at Birmingham Polytechnic and North Staffs Polytechnic (jointly); Hatfield Polytechnic; Highbury College of Technology, London; Huddersfield Polytechnic; Liverpool Polytechnic; Napier College, Edinburgh; Plymouth Polytechnic; the Polytechnic of Wales, in mid-Glamorgan; Queens University, Belfast; Strathclyde University, Glasgow; Sunderland Polytechnic; and the University of Hull. Mr Butcher said that he was 'especially pleased that some of the centres will be based in inner city areas, where they will act as a focus for high technology training in electronics manufacture'. It is hoped to begin work at the first centres in the autumn.

Source: Department of Trade and Industry press notice, 18.8.87.

PRIVATISATION OF GOVERNMENT PLANT-BREEDING AND SEED DEVELOPMENT INTERESTS

The plant-breeding assets of the Plant Breeding Institute (PBI) and all shares in its associated National Seed Development Organisation (NSDO) are to be sold to Unilever for £66 million. Completion of the sale will take place on 30 September.

Announcing the sale, the Secretary of State for Education and Science, Mr Kenneth Baker, said: 'Unilever's bid was the best on commercial, agricultural and scientific grounds. . . . [The] business will be expanded and developed to become Unilever's main centre for plant science and breeding and is intended to remain one of the key world centres of excellence in these fields. . . . Overseas marketing potential will also be enhanced.'

The PBI is an institute of the Agricultural and Food Research Council (AFRC), whose grant of about £3 million a year to the PBI is funded by the Department of Education and Science and the Ministry of Agriculture, Fisheries and Food. Its research programme includes strategic plant science and applied plant breeding, and it carries out most of the state-funded production of finished varieties of cereals, potatoes and field beans. (The PBI's plant science programmes and the oilseed rape breeding programme are not included in the sale. The plant science programmes will become part of the AFRC's new Institute of Plant Science Research, to be based at Norwich, and the oilseed rape breeding programme will be transferred to the Agricultural Genetics Company.) The NSDO, sponsored by the Ministry of Agriculture, Fisheries and Food, produces and markets seed of plant varieties bred with government funding. In 1985-86 the Government received £3·5 million in royalties and £2·5 million in profits from NSDO.

Sources: Department of Education and Science press notices, 7.5.87 and 6.8.87.

DOCKLANDS LIGHT RAILWAY

The Docklands Light Railway, a £77 million project to link parts of London's Docklands with the City of London and to serve adjacent areas of the East End, was officially opened by the Queen on 30 July, and services for passengers were inaugurated on 31 August. The 12·1-km (7·5-mile) route with 15 stations runs from Island Gardens on the north bank of the River Thames to West India Quay, with the line then dividing to give a westbound route to Tower Gateway in the City and a northward route to Stratford. The project is one of the main developments in the regeneration of the London Docklands.[1]

The project has been jointly financed by the London Docklands Development Corporation and by London Regional Transport, and the contractor for the project was GEC Mowlem Railway Construction Group. Services are run by Docklands Light Railway Ltd, a wholly owned subsidiary of London Regional Transport.

The railway is designed to run automatically, with a central computer co-ordinating all the train movements, together with a range of fail-safe measures to protect both people and trains. Stations are unmanned and a train does not have a driver, although each train has a member of staff on board known as a 'train captain' to check tickets, operate train doors and assist passengers, and who can operate the train manually if required. The network has 11 light rail vehicles, electrically powered articulated units of welded steel construction and using GEC control and traction equipment, which were assembled by a company based in the Federal Republic of Germany. The design is based on a development of a standard light rail vehicle widely used elsewhere in Europe and also in North America and in other countries, and each vehicle has seats for 84 passengers, together with floorspace for two wheelchairs and standing space for 130 passengers.

Work on a westward extension to the Bank has recently begun and services are planned to start in April 1990, while plans are in hand for an eastern extension to Beckton which would coincide with the redevelopment of the former Royal Docks.

Source: Docklands Light Railway Ltd press notices, 30.7.87.

SUPERCONDUCTIVITY RESEARCH FUNDING

Materials that offer zero resistance to electrical current at certain temperatures are known as superconductors; they transmit electrical impulses significantly faster than the substances normally used in electronic devices and so can make them work very much more efficiently. Until recently the usefulness of superconductors has been limited by their inability to function at anything but temperatures close to absolute zero (minus 273 degrees C). To keep electronic components at such temperatures is technologically complex and very costly. However, over the past year research in several countries, including Britain, has led to the development of ceramic materials that superconduct at much higher temperatures which can be maintained at much less cost.

On 17 August the Science and Engineering Research Council (SERC) announced grants worth £750,000 to 11 projects of research into various aspects of high temperature superconductivity at British universities. In addition the Science and Engineering Boards of the Council will both commit £1 million to research grants in this field during the 1987-88 academic year. The SERC hopes to increase its funding still further from 1989-90.

The Council has also agreed to the setting up of a joint committee with the Department of Trade and Industry to co-ordinate Britain's research programme on superconductivity. It is to be chaired by Sir Martin Wood, chairman of Oxford Instruments, commercial pioneers of electronic devices using low temperature superconductors. The SERC has already invited higher education institutions in Britain to submit applications to host two multidisciplinary research centres in superconductivity (see p 277).

Source: Science and Engineering Council press notice, 17.8.87.

[1]For information on other developments and on the work of the London Docklands Development Corporation, see COI reference paper *Industrial Regeneration in Britain's Cities*, No 263/86.

Further Measures to Control AIDS and Drug Misuse

The Government has launched the latest phase of its public education campaign against AIDS together with the third phase of its drug prevention campaign at a cost of £5 million. The main theme of the new campaign is the risk of becoming infected with the AIDS virus through injecting drugs.

The campaign against AIDS was first launched in March 1986 (see pp 26 and 397-99, 1986) and that against drug misuse in March 1985 (see p 85, 1985).

Speaking at the launch of the joint campaign, the Secretary of State for Social Services, Mr John Moore, said that the key message was 'Don't inject AIDS'. Injecting drug users were at serious risk of becoming infected with the AIDS virus if they shared needles and syringes. The threat was not only to the drug users themselves but to the unborn babies of infected mothers, to the sexual partners of drug abusers and, from them, to the general population. The Government had developed its drug prevention campaign alongside the anti-injecting campaign because of the crucial importance of warning young people who might be tempted to use drugs of the risks of HIV-infection and AIDS.

In its campaign the Government was using all media – television, cinema, radio, print and posters – to reach three main groups: young people who might be tempted to use drugs; existing drug users who might be tempted to inject; and existing drug injectors. The campaign was hard-hitting as it was essential to reach the young people most at risk. The Government had been particularly concerned to ensure that the anti-injecting message would not be taken as condoning other forms of drug misuse.

Mr Moore also announced an increased government grant of £300,000 to support the work of the Terrence Higgins Trust (the main voluntary agency working in the AIDS field) in 1987-88, and continued financial support for the National AIDS Helpline until at least March 1988. Helpline is a 24-hour, free, confidential telephone service manned by trained advisers to help people who are worried about AIDS and/or drugs. The service is being extended by recruiting advisers from ethnic minority communities and by providing taped information about AIDS in Asian languages and in simple English for those with reading and learning difficulties.

DOCUMENTATION

Government and Administration

Immigration from the Indian Sub-Continent. The Government Reply to the Second Report from the Home Affairs Committee, Session 1985-86, HC 67-I. Contains the Government's responses to specific recommendations for improving entry clearance procedures. It states that the objective is that waiting times for settlement applications should be kept at a minimum and that there has been a general reduction in waiting times. The Government shares the Committee's view that second and subsequent wives should not have the right to join husbands but says that polygamy is not a large problem in terms of numbers of families. The question will be dealt with in the immigration legislation to be introduced this session to reinforce the system of firm but fair controls. Cm 199. HMSO, £1·60. ISBN 0 10 101992 0.

Crown Prosecution Service. Annual Report for the Period April 1986 to March 1987 from the Director of Public Prosecutions to the Attorney-General. HMSO, £8·30. ISBN 0 10 201488 4.

Report of Her Majesty's Chief Inspector of Fire Services 1986. Cm 188. HMSO, £5·10. ISBN 0 10 101822 7.

External Affairs and Defence

Commonwealth Heads of Government Meeting 1987. COI, No 123/87.

East-West Relations: Realism, Vigilance and an Open Mind. Four speeches by the Secretary of State for Foreign and Commonwealth Affairs, Sir Geoffrey Howe. Prepared for the Foreign and Commonwealth Office by the COI.

Britain's Overseas Aid in 1986. (Reproduced from *Survey of Current Affairs.*) COI, No 247/87.

British Aid to Southern Africa: A Force for Peaceful Change and Development. Prepared for the Foreign and Commonwealth Office by the COI.

British Aid Statistics 1982-1986. Overseas Development Administration. £6. ISBN 0 902500 21 X.

Economic and Scientific Affairs

National Economic Development Council Annual Report 1986-87. Available from HMSO, £3. ISBN 0 7292 0871 0.

United Kingdom National Accounts 1987 Edition (see pp 293-5). Central Statistical Office. HMSO, £11·95. ISBN 0 11 620297 1.

The Audit Commission for Local Authorities in England and Wales. Annual Report and Accounts: Year Ended March 31, 1987. HMSO, £3·40. ISBN 0 11 701341 2.

Accounts of the Audit Commission for Local Authorities in England and Wales for the year ended 31 March 1987, together with the Report of the Comptroller and Auditor General thereon. HMSO, £2·60. ISBN 0 10 205588 2.

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Britain's Tax System. COI, No 217/87.

Professional Bodies, their Qualifications and the National Council for Vocational Qualifications. A consultative paper inviting views on how professional qualifications could be linked into the national framework for vocational qualifications. Available unpriced from the National Council for Vocational Qualifications, 222 Euston Road, London NW1 2BZ.

Manpower Services Commission Annual Report 1986-87. Available from the MSC, PP2, Freepost, P.O. Box 161, Bradford BD9 4BR. ISBN 0 86392 224 4.

Health and Safety Commission Report 1985-86. Health and Safety Commission. HMSO, £8·50. ISBN 0 11 883925 X.

A New Income Tax Relief for Profit-Related Pay. An introduction issued by the Treasury. Available free from the Profit Related Pay Office, Inland Revenue, St Mungo's Road, Cumbernauld, Glasgow G67 1YZ.

Focus on Innovation. A report by the Technology Requirements Board. Available unpriced from the TRB, Room 305, Ashdown House, 123 Victoria Street, London SW1E 6RB.

Report on the sea and inland fisheries of Northern Ireland. Department of Agriculture for Northern Ireland. HMSO, Belfast, £3·80. ISBN 0 337 05319 7.

Britain's Oil and Gas Industries. COI, No 198/87.

Digest of United Kingdom Energy Statistics 1987. Department of Energy. HMSO, £13·50. ISBN 0 11 412828 6.

Automatic Level Crossings: A Review of Safety. Department of Transport. HMSO, £5. ISBN 0 11 550831 7.

British Achievements in Science and Technology. COI, No 111/87.

Radioactive Waste Management Advisory Committee: Eighth Annual Report. HMSO, £5·70. ISBN 0 11 752031 4.

Stratospheric Ozone. First Report of the United Kingdom Stratospheric Ozone Review Group. Prepared at the request of the Department of the Environment and the Meteorological Office. HMSO, £9·95. ISBN 0 11 752018 7.

Social and Cultural Affairs

General Register Office for Scotland. Annual Report 1986. HMSO, £14. ISBN 0 11 493408 8.

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Printed in the UK and Published by
HER MAJESTY'S STATIONERY OFFICE
£1.90 net

Annual subscription including indices and postage £23.50
Dd 2844657 C10 SEPTEMBER/1987
ISBN 0 11 728059 3 Vol. 17 No. 9
ISSN 0039-6214